



Frontline Certification Flow Sheet


Eligibility Determination (Proofs required: Income, ID, and Residency):

- At each certification, WIC applicants must present proofs per Addendum *Approved Eligibility Documentation*.
- Hard copies or electronic documentation may be accepted during or prior to scheduled appointment.
- It is encouraged to obtain proofs prior to the scheduled appointment to identify any missing items and streamline the visit per *PPS Secure and Confidential Communications with WIC Participants*.
- Refer to IL WIC PM CS 2.2 and 2.3 for physical presence exceptions.


Step 1 State Search		<ol style="list-style-type: none"> 1. Explain to participant what to expect (certification/re-cert appointment and length of time). <ol style="list-style-type: none"> a. If <u>existing</u> record is found: select that record. Move to Step 2 Record Found below. b. If <u>no existing</u> record: Move to Step 2 No Record Found below
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Precertification Screen can be completed and verified prior to the scheduled appointment

Step 2 Precertification Screen		Record Found / Update Information: <ol style="list-style-type: none"> 1. Access the Precertification screen: update address, phone, etc. as applicable. 2. Select the participant from the applicant grid that needs an appointment. <ol style="list-style-type: none"> a. Add new applicant(s) to the grid, if needed. 	No Record Found / Add New Household (HH): <ol style="list-style-type: none"> 1. Access the Precertification screen. 2. Complete required fields (*) for the Head of Household (HOH). 3. Verify the assigned clinic is correct. Add Applicant(s) Information <ol style="list-style-type: none"> 1. Only add those that are applying for WIC, this includes the Head of Household if she is an eligible applicant. Complete Phone Grid <ol style="list-style-type: none"> 1. Click the ‘Add’ button to add a row to the phone grid. Enter the phone number and phone type. You can enter multiple phone numbers. Indicate “preferred” contact method. Primary Language of Household <ol style="list-style-type: none"> 1. Select the primary language of the household. Mark the Translator Required checkbox as appropriate. 2. Save screen.
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Step 3 Mark On-Site or Schedule		Participant to be seen today (Walk-In): <ol style="list-style-type: none"> 1. Click the Mark on Site button. A popup “How may I help you today” will display. 2. Click the “Service” column to select the appropriate appointment type from the drop down for each applicant. Click Close to save the screen and close the popup. 3. An appointment will auto-generate on the Daily Schedule and client is added to onsite list. 	Making an appointment for a later time / date: <ol style="list-style-type: none"> 1. Click Next to schedule an appointment for a later date. 2. Select New Appointment type from the drop down. 3. Enter a start and end date to search and schedule the appointment.
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If proofs were obtained prior to the visit, enter in Step 4a below.






<p>Step 4a Household Information</p>  <p><u>References:</u></p> <ul style="list-style-type: none"> • IL WIC PM CS 1.1-1.2 • Understanding Roles in WIC • 30 Day Certification / No Proof Form 	<ol style="list-style-type: none"> 1. Mark on Site all applicant(s) to be seen. 2. Access the Household Information <ol style="list-style-type: none"> a. This screen consists of 2 tabs (household information and income information) that must be completed. 3. Household information tab – complete all required fields, including proxy. 4. Advise HOH that their zip code will be linked to their EBT card listed in the WIC MIS. **Note: it is essential the HOH’s date of birth (DOB) and zip code are entered accurately in the MIS as this is used when setting the eWIC card PIN** 5. Select Proof of Residency provided. <ol style="list-style-type: none"> a. If HOH is homeless, document per policy 6. Select and add a Service Location for WIC staff and HOH. 7. Click the Next button to save the Household Information tab and to automatically advance to the Income Information tab. 		
<p>Step 4b Income information</p> <p><u>References:</u></p> <ul style="list-style-type: none"> • IL WIC PM CS 1.1, 4 • Approved Adjunctive Eligibility Resources • Documenting Adjunctive Eligibility • Rights and Responsibilities 	<p>Income information tab – complete all required fields:</p> <ol style="list-style-type: none"> 1. Adjunct Eligibility or EHS/HS verification must be determined before performing a Traditional income screening. 2. Single documentation may be used for multiple proofs. 		
	<p>Adjunct Eligibility – Applicant has Title 19 Medicaid, SNAP, or TANF:</p> <ol style="list-style-type: none"> 1. Household Not Participating - determine all programs the household is participating in, this will autofill the REP checkboxes with either a “Yes” or a “No”. 2. Include in Verification – will be automatically checked for each person marked onsite for a certification appointment in the household. 3. Verify “VER” only <u>one</u> program to determine adjunctive eligibility. Click VER to verify documentation used as proof. 4. Add a blank row to the household income grid. Using only verbal income reported by the HoH, complete the required fields. <ol style="list-style-type: none"> a. Select adjunctive eligibility for documentation proof. b. <u>Foster Child</u>- Select DCFS Custody for documentation proof and use the monthly stipend received by foster family. 	<p>EHS / HS Enrollment Papers</p> <ol style="list-style-type: none"> 1. Mark Household Not Participating in any programs box. 2. Add a blank row to the household income grid. Using only verbal income reported by the HOH, complete the required fields. <ol style="list-style-type: none"> a. Select State Administered Program for documentation proof. 	<p>Traditional Income</p> <ol style="list-style-type: none"> 1. Mark Household Not Participating in any programs box. 2. Add a blank row to the household income grid. Each type of income available in the last 28-31 days to the household must be added one row at a time. 3. Complete all required fields based on income documentation provided by the HOH. 4. When an applicant fails to bring proof, staff must complete a 30-Day Certification. 5. No Proof or Zero Income: <ol style="list-style-type: none"> a. Document as “30 Day Certification” or “No Proof” per policy. b. Complete the 30-Day Certification / No Proof form and scan into participant’s record. c. Offer and document appropriate referrals per policy.



	<ol style="list-style-type: none"> 3. Enter household size. <ol style="list-style-type: none"> a. Pregnant woman includes herself & fetus(es), in addition to anyone else in the household. b. Foster child would be a household of 1. 4. Review Rights and Responsibilities in appropriate language before being signed. <ol style="list-style-type: none"> a. Capture signature of HOH and document in WIC MIS. b. Toggle from the household level to the Participant Level and click Next to save the screen and advance to the Participant Info Screen.
<p>Step 5 Participant Information To be completed for <u>each</u> applicant.</p>  <p><u>References:</u></p> <ul style="list-style-type: none"> • <i>IL WIC PM AD 7.5, Civil Rights</i> • <i>IL WIC PM AD 13.1, PPS NVRA Flow Chart</i> 	<ol style="list-style-type: none"> 1. Enter Second Parent information (infant/child categories), otherwise mark declined (CS 1.1). 2. Verify Birth Date and Gender and save. 3. If infant or child, and Mother is on WIC select Mother's ID. <ol style="list-style-type: none"> a. If foster child, indicate Mother Not in HH. 4. Foster Care – check box, if applicable, this indicates documentation was reviewed. 5. Ethnicity – Hispanic/Latino: answer Yes or No (AD 7.5 for guidance on collecting) 6. Race (at initial certification): Select all that apply to applicant. (AD 7.5 for guidance on collecting) 7. Select Proof of Identity verified. 8. The Special Needs field is available as relevant. 9. If ineligible, follow policy CS 13. 10. Voter Registration – document per <i>PPS NVRA Flow Sheet</i>. Print and complete the Voter Registration Information (VRI) and Application, as applicable. 11. Save and repeat process for each applicant, if applicable.
<p>Step 6 Referrals</p> <p><u>References:</u> <i>IL WIC PM AD 12 and CS 13 for referral requirements</i></p>	<ol style="list-style-type: none"> 1. Document required referrals on the Referral screen using general or agency specific categories. <ol style="list-style-type: none"> a) “Household referral” will apply the referral to all participants within a household. “Individual referral” will apply the referral only to the participant. b) If referral not available from list on Referrals screen, document in General Note.
<p>Step 7 eWIC Card Set-Up (New household / those without an EBT card only)</p> <p><u>References:</u></p> <ul style="list-style-type: none"> • <i>Using Your Illinois eWIC Card</i> <p>HOH should set up a PIN before leaving the clinic.</p>	<ol style="list-style-type: none"> 1. On the menu bar, click Benefits, then eWIC Card Account Maintenance. 2. Cardholder type is always HOH and the Card Holder Name is the HOH. If the name is not correct, go to the Household Info screen to correct before proceeding. 3. Obtain an unassigned eWIC card from inventory. 4. Select the Head of Household row in the EBT Accounts grid, then click the Account Setup button. 5. A popup opens with Card Issued To, Card Holder Name and Head of Household DOB. If information is not correct, cancel popup and go to the Household Info screen and correct the information before proceeding. 6. If information in popup is correct, swipe the new card in the EBT reader or enter the EBT card number. Click Submit. 7. You will receive the message “account successfully established”. 8. If submit was not successful, contact the State WIC Staff for assistance by completing an I-WIC Issue Report form with your supervisor.
<p>Step 8 Close Participant Record</p> 	<ol style="list-style-type: none"> 1. Participant record must be closed for CPA/CPAA to continue the Certification. 2. Close record by selecting Search.

CPA/CPAA L2 Certification Flow Sheet

Refer to:
IL WIC PM CS 6.5, Addendum *WIC Assessment Guides*

<p>Step 1 Open participant Record</p> 	<ol style="list-style-type: none"> 1. Using the Onsite List, locate and select the desired record.
<p>Step 2 Cert Action</p>  <p><u>References:</u></p> <ul style="list-style-type: none"> • <i>IL WIC PM CS 2.2, 2.3 for physical presence exceptions</i> • <i>NPS Breastfeeding</i> 	<ol style="list-style-type: none"> 1. Select Cert Action from the guided script and Add a new certification. 2. If <u>woman</u> cert: <ol style="list-style-type: none"> a. Pop-up box: Is participant currently pregnant? <ol style="list-style-type: none"> i. OK = Pregnant; Cancel = Not pregnant <p>Pregnant</p> <ol style="list-style-type: none"> 1. Enter either the Last Menstrual Period (LMP) or the Expected Delivery Date (EDD). <ol style="list-style-type: none"> a. Update the EDD as needed; the system will update the Cert End date. <p>Not Pregnant (Infant, C1-4, or Woman)</p> <ol style="list-style-type: none"> 1. Answer BF Status pop-up questions. 2. Enter Actual Delivery Date (ADD) – woman only 3. Mark “Present for Cert”. <ol style="list-style-type: none"> a. If not present, select “Reason not Present” from the dropdown. If ARPA waiver used, select “Other”. b. Clarify exception to physical presence in Notes (e.g., medical condition, unreasonable barrier). 4. Click Next to save and move to the Lab Screen.
<p>Step 3 Lab</p>  <p><u>References:</u></p> <ul style="list-style-type: none"> • <i>IL WIC PM CS 6 & CS 13</i> 	<p>2 Tabs for Women; 3 Tabs for Infants/Children</p> <ol style="list-style-type: none"> 1. Height / Weight (Anthropometrics): verbal data is not acceptable <ol style="list-style-type: none"> a. Collect on-site or via referral data: <ol style="list-style-type: none"> i. Referral data must be received prior to or at the time of the WIC appointment. ii. If referral data is provided, document anthropometric measurements (must be within past 60 days) and biochemical (pertinent to category and policy timeframes) as non-WIC and enter date measurements were taken. iii. If measurement is questionable, check “?” and indicate reason why. b. Anthropometric and biochemical data can only be deferred per policy. <ol style="list-style-type: none"> i. Deferral reason must be documented on Lab Screen. c. Birth weight / length – only enter per policy, otherwise mark “unknown”. d. Weeks gestation – enter number of whole weeks completed, otherwise mark “unknown”. e. Pre-pregnancy weight & weight at delivery– verbal data is acceptable. 2. Immunization, Lead, and Hemoglobin/Hematocrit Screenings - complete per IL WIC Policy CS 6 and CS 13. If referral provided, also document on Referral screen. 3. Save/Next to view Growth Chart / review with family. If woman, click Prenatal Chart button (bottom of screen) / review Prenatal Weight Gain Grid and recommendations. 4. Save and move to Breastfeeding screen, if applicable.


<p>Step 4 Breastfeeding</p>  <p><i>*Breastfeeding dyads only</i></p> <p>References:</p> <ul style="list-style-type: none"> • NPS Documenting in WIC MIS • NPS Breastfeeding 	<p>4 Tabs for Women; 3 Tabs for Infants/Children, if applicable:</p> <ol style="list-style-type: none"> 1. BF Information – answer as applicable then click Next. 2. BF Questions - answer as applicable then click Next. <ol style="list-style-type: none"> a. Women only “Are you experiencing any of the following?” – <u>Only</u> answer if <u>currently</u> breastfeeding (pregnant and breastfeeding or breastfeeding), otherwise check “none”. 3. BF Support & Notes – complete and click Next. <ol style="list-style-type: none"> a. <u>The Link Baby</u> buttons (single gestation) – link the breastfeeding dyad contacts and notes. If BFPC program, do not link “contacts” section until baby is at least 8 days old. 3. BF Pumps & Aids – complete as applicable then click Next to move to the Health Screen.
<p>Step 5 Health</p> 	<p><u>Women</u></p> <ol style="list-style-type: none"> 1. Complete both tabs – Pregnancy Information and Health Information. <ol style="list-style-type: none"> a. Click Next to move through the pages and tabs. b. After completing both tabs, click Next to move to the Nutrition Screen. <p><u>Infants / Children</u></p> <ol style="list-style-type: none"> 1. Complete all questions. Click Next to move to the Nutrition Screen.
<p>Step 6 Nutrition</p> 	<ol style="list-style-type: none"> 1. Complete all 3 pages. Click Next to save and move to the Nutrition Risk Screen.
<p>Step 7 Nutrition Risk</p>  <p><i>*When a participant is “high risk”, a CPAA must make referrals per Addendum Guidelines for Referrals for CPA Assistants and local agency procedures.</i></p> <p>References: IL WIC PM AD 11.3 and 12.3</p>	<ol style="list-style-type: none"> 1. Review auto generated risks for accuracy. <ol style="list-style-type: none"> a. Risk is <u>incorrect</u>: <ol style="list-style-type: none"> i. Select the row to be deleted and click Remove. Go back to the screen where the risk was triggered and update the data so the risk will no longer generate. Recheck the risk screen to ensure risks were removed. b. <u>Manually</u> assigned risks: <ol style="list-style-type: none"> i. Click Add and review the dropdown of manually assigned risks. Select all that apply. 2. Click Next to save and move to the Nutrition Education Screen. For BF Dyads - once assessments are complete for both, recheck risk screens to ensure breastfeeding risks generated for both mom and baby. Reason Button will display a description of why the risk was assigned. Risk Help Button will open the IL WIC Nutrition Risk Criteria. <i>(Red heart icon indicates high risk)</i>
<p>Step 8 Nutrition Education</p>  <p>References:</p> <ul style="list-style-type: none"> • AWIC Program Explanation • NPS Documenting in WIC MIS 	<ol style="list-style-type: none"> 1. Provide nutrition education related to what the participant/parent/caregiver would like to discuss, assessment, review of current risk factors and/or previous notes. 2. Click Add to enter a Nutrition Education topic discussed. 3. Click in the Method box to select Primary Individual from the dropdown list. 4. Select the Topic discussed from the dropdown. 5. Add a Note - document WIC nutrition education provided: <ol style="list-style-type: none"> a. This includes additional topics discussed, handouts reviewed/requested related to the topic, certification visit education, nutrition education details, participant centered goal(s) and what follow up is planned for the next visit. 6. Click Next to move to the Food Prescription Screen.


<p>Step 9 Food Prescription </p> <p><u>References:</u></p> <ul style="list-style-type: none"> • <i>Illinois WIC Food Package Tables</i> • <i>Healthy Options for WIC</i> • <i>Understanding Family Shopping List</i> • <i>NPS Documenting in WIC MIS</i> 	<ol style="list-style-type: none"> 1. Mark Certification Complete and Save. 2. Click Add to assign a core food package (CPAA must refer food package prescriptions that are specialized/Medically Prescribed Formula to a CPA). <ol style="list-style-type: none"> a. Tailor core package to meet participant’s need and preferences. b. Remove any foods the participant is allergic to. c. Note field should be used to document per <i>NPS Documenting in WIC MIS</i>. 3. Display participants food package to ensure foods and quantities are correct.
<p>Step 10 Issue Benefits</p>	<ol style="list-style-type: none"> 1. Preview benefits before issuing to ensure foods and quantities are correct. 2. Issue Benefits and close when “EBT transaction completed successfully” appears. 3. Educate and provide the <i>Family Shopping List</i> to explain how to get the full nutrition benefit from the foods in their package.
<p>Step 11 Referrals</p> <p><u>References:</u></p> <ul style="list-style-type: none"> • <i>IL WIC PM AD 12 and CS 13 for referral requirements</i> 	<ol style="list-style-type: none"> 1. Document required referrals on the Referral screen using general or agency specific categories. <ol style="list-style-type: none"> a. “Household referral” will apply the referral to all participants within a household. “Individual referral” will apply the referral only to the participant. b. Use the General Note to clarify details on referrals as needed. 1. CPAA must defer referrals to Primary Care Providers to a CPA.
<p>Step 12 Review with Participant</p> <p>See Step 13 #2 for additional handouts</p>	<ol style="list-style-type: none"> 1. Explain WIC ID Card including participant rights / responsibilities. 2. Explain use of EBT card, using “Illinois WIC EBT Card” handout. 3. Review with HOH how to set up a PIN for the EBT Card, for new participants. 4. Review WIC EBT Authorized Vendor list for your clinic. 5. Ask, “What questions or concerns do you have about shopping for WIC foods or using your EBT card?”
<p>Step 13 Schedule Appt Print Documents </p> <ul style="list-style-type: none"> • <i>IL WIC PM CS 8</i> 	<ol style="list-style-type: none"> 1. Schedule next appointment (on or before the BVT) to populate on FSL and write on WIC ID card. <ol style="list-style-type: none"> a. Review Cert Action screen when scheduling in-person vs remote visit to determine if they are eligible for a remote visit. 2. Provide applicable documents to participant: <ol style="list-style-type: none"> a. Family Shopping List, IL WIC Food List and IL WIC Vendor List b. Handout “How to Read your Illinois WIC EBT Receipt” c. Handout “Illinois WIC EBT Card” d. Handout “eWIC Card Brochure” e. WIC BNFT App Brochure(s) f. Any other handouts participant agreed to during nutrition education 3. Place documents in WIC ID Card.


Mid Certification Flow Sheet

Refer to:
 IL WIC PM CS 9.1 for mid-certification appointment requirements
 IL WIC PM CS 2.2 and 2.3 for physical presence exceptions


Frontline

Step 1 Local Agency Search		<ol style="list-style-type: none"> 1. Locate existing participant record. <p>Explain to participant what to expect and length of time of the appointment.</p>
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Step 2 Mark Attended or On-Site		<p>Scheduled Appt.:</p> <ol style="list-style-type: none"> 1. Go to the Daily Schedule and locate your Mid-Cert appointment. 2. Click on the appointment slot, then click the 'Attended' button. 3. When the pop-up box appears, check the Attend column for your participant. 4. Click on the Close button to close the popup. 	<p>On-Site (no scheduled appt.):</p> <ol style="list-style-type: none"> 1. Click the Mark on Site button. A popup "How may I help you today" will display. 2. Click the "Service" column to select the appropriate appointment type, MID-CERT. Click Close to save the screen and close the popup. <p>An appointment will auto-generate on the Daily Schedule and client is added to onsite list.</p>
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Step 3 Household Info Screen		<ol style="list-style-type: none"> 1. Verify/Update address, phone, etc. as applicable. <ol style="list-style-type: none"> a. If screen is updated, add a Service Location for WIC staff and HOH. 2. Close participant record by clicking the Search icon. 3. Review HOH name and birth date to ensure correct. 4. Select and add a Service Location for WIC staff and HOH. 5. Participant is now ready for the Competent Professional Authority (CPA) or CPA Assistant (CPAA). <p>Note: if HOH discloses a change in income, complete an income reassessment.</p>
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CPA (*required I-WIC screens)


Step 1 Open Participant Record		<ol style="list-style-type: none"> 1. Using the Onsite List, locate and select the desired record. 2. Record will open to the Household Summary screen at the participant level.
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Step 2 Setting the stage	<ol style="list-style-type: none"> 1. Review participant record: Nutrition Education and Nutrition Risk Factor screens and case notes. 2. Explain to participant what to expect and length of time of the appointment.
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Refer to NPS Counseling Approach


Step 3 Cert Action Screen <i>*Breastfeeding dyads only</i>		<p>Note: Complete ONLY for a breastfeeding woman and a breastfeeding infant if their breastfeeding status has changed.</p> <p>If changes have occurred since the last visit, click on the BF Status Change button and answer the questions as appropriate for each participant.</p>
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<p>Step 4 *Lab Screen </p> <p><u>References:</u> • IL WIC PM CS 6 & CS 13</p>	<p>2 Tabs for Women; 3 Tabs for Infants/Children</p> <ol style="list-style-type: none"> Height / Weight (Anthropometrics): verbal data is not acceptable <ol style="list-style-type: none"> Collect on-site or via referral data: <ol style="list-style-type: none"> Referral data must be received prior to or at the time of the WIC appointment. If referral data is provided, document anthropometric measurements (must be within past 60 days) and biochemical (pertinent to category and policy timeframes) as non-WIC and enter date measurements were taken. If measurement is questionable, check “?” and indicate reason why. Anthropometric and biochemical data can only be deferred per policy. <ol style="list-style-type: none"> Deferral reason must be documented on Lab Screen. Birth weight / length – only enter per policy, otherwise mark “unknown”. Weeks gestation – enter number of whole weeks completed, otherwise mark “unknown”. Pre-pregnancy weight & weight at delivery– verbal data is acceptable. Immunization, Lead, and Hemoglobin/Hematocrit Screenings - complete per IL WIC Policy CS 6 and CS 13. If referral provided, also document on Referral screen. Save/Next to view Growth Chart / review with family. If woman, click Prenatal Chart button (bottom of screen) / review Prenatal Weight Gain Grid and recommendations. Save and move to Breastfeeding screen, if applicable.
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<p>Step 5 Breastfeeding Screen *Breastfeeding dyads only </p>	<p>Note: Complete ONLY for a breastfeeding woman and a breastfeeding infant to verify and update continued breastfeeding status. (CPAA staff must refer changes to CPA).</p> <ol style="list-style-type: none"> Review and update breastfeeding screens as appropriate. <ol style="list-style-type: none"> Ensure that mom and baby are linked (single gestation). Check *Verified to indicate that the BF Information was reviewed. Complete/update BF Questions as appropriate. Add any new BF Support & Notes, click Next.
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<p>Step 6 *Mid Certification Screen</p> <p><u>Reference</u> IL WIC PM SFD Section 7.4 Look at Me Now 6-11 Months</p>	<ol style="list-style-type: none"> Review Health and Nutrition screens to follow up on initial assessment and update as needed. Enter data for the required questions (bold/*) and as many of the optional questions as possible. <ol style="list-style-type: none"> Infants 6 months and older – assess developmental readiness and review Look at Me Now 6-11 Months prior to substituting jarred infant foods for CVB. Click the Save or Next button to save the data.
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<p>Step 7 Nutrition Risk  Review / update as needed</p> <p><i>*When a participant is “high risk”, a CPAA must make referrals per Addendum Guidelines for Referrals for CPA Assistants and local agency procedures.</i></p> <p><u>References:</u> IL WIC PM AD 11.3 and 12.3</p>	<ol style="list-style-type: none"> Review if any information was updated on the Health and Nutrition screens. New risks will be assigned when the screen is opened. <p>Reason Button will display a description of why the risk was assigned. Risk Help Button will open the IL WIC Nutrition Risk Criteria. (Red heart icon indicates high risk)</p>
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<p>Step 8 *Nutrition Education </p> <p>Refer to: <i>NPS Nutrition Education for requirements on effective individual education</i></p>	<ol style="list-style-type: none"> 1. Provide nutrition education based on what the participant/parent/caregiver/proxy would like to discuss, mid-certification assessment, review of current risk factors and/or previous notes. <p><u>Document:</u></p> <ol style="list-style-type: none"> 2. Click Add to enter a Nutrition Education topic discussed. 3. Click in the Method box to select type of education, Secondary Individual 4. Select Topic discussed from the dropdown. 5. Add a Note - document WIC nutrition education provided. <ol style="list-style-type: none"> a. This includes additional topics discussed, handouts reviewed/requested related to the topic, nutrition education details, participant centered goal(s) and what follow up is planned for the next visit. b. Refer to <i>NPS Documenting in WIC MIS</i> for guidance. 6. Click Next to move to the Food Prescription Screen.
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<p>Step 9 *Food Prescription </p> <p><u>References:</u></p> <ul style="list-style-type: none"> • <i>Illinois WIC Food Package Tables</i> • <i>Healthy Options for WIC</i> • <i>Understanding Family Shopping List</i> • <i>NPS Documenting in WIC MIS</i> 	<ol style="list-style-type: none"> 1. Review participant’s current Food Package <ol style="list-style-type: none"> a. Ask: “Would you like to make any changes to your WIC benefits?” b. Modify food package if requested. (CPAA must refer changes outside core food packages or requests for Medically Prescribed Formula.) c. Ask: “What questions or concerns do you have about shopping for WIC foods or using your EBT card?” 2. Review <i>Family Shopping List</i> (FSL) and provided printed copy. <ol style="list-style-type: none"> a. If remote, ask “How would you like to receive your updated shopping list?” <ol style="list-style-type: none"> i. Options: mailed, secured email, pick up or ask do you use the Bnft app/web portal to view your benefits? Note: if the app/web portal is preferred by HOH, educate that the online version is not as detailed, as the printed FSL. Ensure they have not had any difficulties shopping for WIC benefits. b. If declined, document in notes. <p>Infants 6-11 mo. – CPA/CPAA only HOH may substitute a portion of or all the jarred infant foods for a CVB after an individual assessment has been completed by CPA/CPAA. Document appropriate nutrition education provided in Notes.</p>
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<p>Step 10 *Issue Benefits  *Schedule Appt</p>	<ol style="list-style-type: none"> 1. Issue Benefits <ol style="list-style-type: none"> a. Issue Benefits and close when “EBT transaction completed successfully” appears. b. Review <i>Family Shopping List</i> and provide to family. 2. Schedule next appointment.
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<p>Step 11 Referrals <u>References:</u> <i>IL WIC PM AD 12 and CS 13 for referral requirements</i></p>	<ol style="list-style-type: none"> 1. Document required referrals on the Referral screen using general or agency specific categories. <ol style="list-style-type: none"> a. “Household referral” will apply the referral to all participants within a household. “Individual referral” will apply the referral only to the participant. b. Use the General Note to clarify details on referrals as needed. 2. CPAA must defer referrals to Primary Care Providers to a CPA.
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Individual Nutrition Education (In-person or Telephone) Flow Sheet


Frontline


Step 1 Local Agency Search 	<ol style="list-style-type: none"> 1. Locate existing participant record. 2. If in-person, move to Step 2. 3. If telephone visit, call participant. <ol style="list-style-type: none"> a. Explain to participant what to expect and length visit and move to Step 2. b. If unable to reach, document and attempt another call later.
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Step 2 Mark Attended or On-Site 	Scheduled Appt.: <ol style="list-style-type: none"> 1. Go to the Daily Schedule and locate your N/ED or Class appointment. 2. Click on the appointment slot, then click the Attended button. 3. When the pop-up box appears, check the Attend column for your participant. 4. Click on the Close button to close the popup. 	On-Site (no scheduled appt.): <ol style="list-style-type: none"> 1. Click the Mark on Site button. A popup “How may I help you today” will display. 2. Click the “Service” column to select the appropriate appointment type, N/ED. 3. Click Close to save the screen and close the popup. 4. An appointment will auto-generate on the Daily Schedule and client is added to onsite list.
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Step 3 Household Info Screen  <i>Head of Household (HOH)</i>	Update Information: <ol style="list-style-type: none"> 1. Verify/Update address, phone, etc. as applicable. 2. Add a Service Location for WIC staff and Head of Household (HOH). 3. Close participant record by selecting Search. 4. Review HOH name and birth date to ensure correct. 5. Participant is now ready for the Competent Professional Authority (CPA) or CPA Assistant (CPAA).
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CPA/CPAA (*required I-WIC screens)


Step 1 Open participant Record  <i>Refer to NPS Counseling Approach</i>	<ol style="list-style-type: none"> 1. Using the Onsite List, locate and select the desired record. 2. Record will open to the Household Summary screen at the participant level. 3. Review participant record, Nutrition Education screen and case notes before beginning the telephone education. 4. Explain to participant what to expect and length of time of the call or video chat.
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Step 2 Cert Action Screen *Breastfeeding dyads only 	<p>Note: Complete ONLY for a breastfeeding woman and a breastfeeding infant if their breastfeeding status has changed. (CPAA staff must refer changes to CPA).</p> <p>If changes have occurred since the last visit, click on the BF Status Change button and answer the questions as appropriate for each participant.</p>
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Step 3 Breastfeeding Screen *Breastfeeding dyads only 	<p>Note: Complete ONLY for a breastfeeding woman and a breastfeeding infant to verify and update continued breastfeeding status.</p> <ol style="list-style-type: none"> 1. Ensure that mom and baby are linked (single gestation). 2. Add any BF Support & Notes, click Next.
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<p>Step 4 *Nutrition Education </p> <p>Refer to NPS Nutrition Education for requirements on effective individual education.</p> <p>*When a participant is “high risk”, a CPAA must make referrals per Addendum Guidelines for Referrals for CPA Assistants and local agency procedures.</p> <p><u>References:</u> IL WIC PM AD 11.3 and 12.3</p>	<ol style="list-style-type: none"> 1. Provide nutrition education based on what the participant/parent/caregiver would like to discuss, review of current risk factors and/or previous nutrition education topic and notes. <p><u>Document:</u></p> <ol style="list-style-type: none"> 2. Click Add to enter a Nutrition Education topic discussed. 3. Click in the Method box to select type of education, Secondary Individual 4. Select the main Topic discussed from the dropdown. 5. Add a Note - document WIC nutrition education provided for telephone education: <ol style="list-style-type: none"> a. This includes additional topics discussed, handouts reviewed related to the topic, nutrition education details, participant centered goal(s) and what follow up is planned for the next visit. b. Refer to <i>NPS Documenting in WIC MIS</i> for guidance. 6. Click Next to move to the Food Prescription Screen.
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<p>Step 5 *Food Prescription </p> <p><u>References:</u></p> <ul style="list-style-type: none"> • Illinois WIC Food Package Tables • Healthy Options for WIC • Understanding Family Shopping List • NPS Documenting in WIC MIS 	<ol style="list-style-type: none"> 1. Review participant’s current Food Package <ol style="list-style-type: none"> a. Ask: “Would you like to make any changes to your WIC benefits?” b. Modify food package if requested. (CPAA must refer changes outside core food packages or requests for Medically Prescribed Formula.) c. Ask: “What questions or concerns do you have about shopping for WIC foods or using your EBT card?” <p>Infants 6-11 mo. – CPA/CPAA only HOH may substitute a portion of or all the jarred infant foods for a CVB after an individual assessment has been completed by CPA/CPAA. Document appropriate nutrition education provided in Notes.</p>
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<p>Step 6 *Issue Benefits *Schedule Appt </p>	<ol style="list-style-type: none"> 1. Issue Benefits <ol style="list-style-type: none"> a. Prior to issuing benefits, you may be required to select and add a Service Location for CPA staff and HOH on the Household Info Screen. b. Issue Benefits and close when “EBT transaction completed successfully” appears. c. Review <i>Family Shopping List</i> and provide printed version if in-person. 2. If telephone visit, Ask: “How would you like to receive your updated Family Shopping List (FSL)?” <ol style="list-style-type: none"> a. Options: mailed, secure email, pick up or ask do you use the Bnft app/web portal to view your benefits? Note: if the app/web portal is preferred by HOH, educate that the online version is not as detailed, as the printed FSL. Ensure they have not had any difficulties shopping for WIC benefits. b. If declined, document in notes. 3. Schedule next appointment, on or before the BVT date.
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<p>Step 7 Referrals <u>References:</u> IL WIC PM AD 12 and CS 13 for referral requirements</p>	<ol style="list-style-type: none"> 1. Document required referrals on the Referral screen using general or agency specific categories. <ol style="list-style-type: none"> a) “Household referral” will apply the referral to all participants within a household. “Individual referral” will apply the referral only to the participant. b) Use the General Note to clarify details on referrals as needed. 2. CPAA must defer referrals to Primary Care Providers to a CPA.
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WIChealth Nutrition Education Flow Sheet

Frontline






<p>Step 1 Local Agency Search</p>  <p><i>Review the Household Summary screen to identify the family's appointments</i></p>	<ol style="list-style-type: none"> 1) Locate existing participant record. 2) Review the Nutrition Education screen and ensure the Certificate of Completion from WICHealth.org has been received. 3) Call participant <ol style="list-style-type: none"> a. Explain to participant what to expect and length of time of the call. b. If unable to reach the participant/HOH attempt another call later. If unable to reach, leave a message (if able) to contact clinic regarding reschedule appointment. <p>Note: If the lesson was completed the day of the appointment, it will not appear in the MIS' Nutrition Education Screen until the next day. Staff will need to log into the agency's WICHealth.org/support account and enter the Household ID to verify education was completed.</p>		
<p>Step 2 Mark Attended or On-Site</p> 	<table border="1" style="width: 100%;"> <tr> <td style="width: 50%; vertical-align: top;"> <p>Attended Scheduled Appt.:</p> <ol style="list-style-type: none"> 1. Go to the Daily Schedule and locate your N/ED or Class appointment. 2. Click on the appointment slot, then click the Attended button. 3. When the pop-up box appears, check the Attend column for your participant. 4. Click on the Close button to close the popup. </td> <td style="width: 50%; vertical-align: top;"> <p>On-Site, no scheduled appt.:</p> <ol style="list-style-type: none"> 1. Click the Mark on Site button. A popup "How may I help you today" will display. 2. Click the "Service" column to select the appropriate appointment type, N/ED. 3. Click Close to save the screen and close the popup. 4. An appointment will auto-generate on the Daily Schedule and client is added to onsite list. </td> </tr> </table>	<p>Attended Scheduled Appt.:</p> <ol style="list-style-type: none"> 1. Go to the Daily Schedule and locate your N/ED or Class appointment. 2. Click on the appointment slot, then click the Attended button. 3. When the pop-up box appears, check the Attend column for your participant. 4. Click on the Close button to close the popup. 	<p>On-Site, no scheduled appt.:</p> <ol style="list-style-type: none"> 1. Click the Mark on Site button. A popup "How may I help you today" will display. 2. Click the "Service" column to select the appropriate appointment type, N/ED. 3. Click Close to save the screen and close the popup. 4. An appointment will auto-generate on the Daily Schedule and client is added to onsite list.
<p>Attended Scheduled Appt.:</p> <ol style="list-style-type: none"> 1. Go to the Daily Schedule and locate your N/ED or Class appointment. 2. Click on the appointment slot, then click the Attended button. 3. When the pop-up box appears, check the Attend column for your participant. 4. Click on the Close button to close the popup. 	<p>On-Site, no scheduled appt.:</p> <ol style="list-style-type: none"> 1. Click the Mark on Site button. A popup "How may I help you today" will display. 2. Click the "Service" column to select the appropriate appointment type, N/ED. 3. Click Close to save the screen and close the popup. 4. An appointment will auto-generate on the Daily Schedule and client is added to onsite list. 		
<p>Step 3 Household Info Screen</p>  <p><i>Head of Household (HOH)</i></p>	<p>Update Information:</p> <ol style="list-style-type: none"> 1. Verify/Update address, phone, etc. as applicable. <ol style="list-style-type: none"> a. If screen is updated, add a Service Location for WIC staff and HOH. 2. Close participant record by selecting Search. 3. Review HOH name and birth date to ensure correct. 		
<p>Step 4</p> <p><i>Refer to NPS Nutrition Education, Addendum 2 for more details</i></p>	<ol style="list-style-type: none"> 1. If the participant is a child: 2. Review participant's current Food Package <ol style="list-style-type: none"> a. Ask: "Would you like to make any changes to your WIC benefits?" b. Ask: "Do you have any questions for the WIC Nutritionist today?" 3. If the answer was yes to a or b, transfer the participant to the CPA/CPAA. 4. If the answer was no to a & b, Frontline may continue to CPA/CPAA, Step 5. 5. All other categories must be transferred to the CPA/CPAA, Step 1 to ensure required education is provided. 		


<p>Step 1 Open participant Record</p>	<ol style="list-style-type: none"> Using the Onsite List, locate and select the desired record. Record will open to the Household Summary screen at the participant level.
<p>Step 2 Cert Action Screen *Breastfeeding dyads only</p> 	<p>Note: Complete ONLY for a breastfeeding woman and a breastfeeding infant if their breastfeeding status has changed (CPAA staff must refer changes to CPA).</p> <p>If changes have occurred since the last visit, click on the BF Status Change button and answer the questions as appropriate for each participant.</p>
<p>Step 3 Breastfeeding Screen *Breastfeeding dyads only</p> 	<p>Note: Complete ONLY for a breastfeeding woman and a breastfeeding infant to verify and update continued breastfeeding status.</p> <ol style="list-style-type: none"> Ensure that mom and baby are linked (single gestation). Add any BF Support & Notes, click Next.
<p>Step 4 *Food Prescription</p>  <p><i>Refer to NPS Nutrition Education, Addendum 2 for more details</i></p> <p><u>References:</u></p> <ul style="list-style-type: none"> Illinois WIC Food Package Tables Healthy Options for WIC Understanding Family Shopping List NPS Documenting in WIC MIS 	<ol style="list-style-type: none"> Review participant’s current Food Package and confirm any required education needed. <ol style="list-style-type: none"> Ask: “Would you like to make any changes to your WIC benefits?” Modify food package if requested. (CPAA must refer changes outside core food packages or requests for Medically Prescribed Formula.) Ask: “What questions or concerns do you have about shopping for WIC foods or using your EBT card?” Ask: “How would you like to receive your updated Family Shopping List (FSL)?” <ol style="list-style-type: none"> Options: mailed, secured email, pick up or ask do you use the Bnft app/web portal to view your benefits? Note: if the app/web portal is preferred by HOH, educate that the online version is not as detailed, as the printed FSL. Ensure they have not had any difficulties shopping for WIC benefits. If declined, document in notes. <p>Infants 6-11 mo. – CPA/CPAA only HOH may substitute a portion of or all the jarred infant foods for a CVB after an individual assessment has been completed by CPA/CPAA. Document appropriate nutrition education provided in Notes.</p>
<p>Step 5 *Nutrition Education</p> 	<ol style="list-style-type: none"> This screen does not need completed by staff. Data will auto-populate from WIChealth.org. <ol style="list-style-type: none"> If the WIChealth lesson was completed the same day as the appointment, the Certificate of Completion will not show until the next day. Complete verification process in Frontline Step 1.
<p>Step 6 *Issue Benefits *Schedule Appt</p> 	<ol style="list-style-type: none"> Issue Benefits <ol style="list-style-type: none"> Issue Benefits and close when “EBT transaction completed successfully” appears. Review <i>Family Shopping List</i> Schedule next appointment.


Group Nutrition Education Flow Sheet

This guidance is for group education that is **already created and available in your local agency schedule**.
Please refer to *Class Setup* located within the Scheduling Tasks dropdown in the Admin Module.
Refer to IL WIC PM NE 5.5 and Addendum *NPS Nutrition Education*.


Frontline

<p>Step 1 Local Agency Search</p> 	<p>Scheduling Appt: <i>If participant is already scheduled for the class, skip to step 2 below.</i></p> <ol style="list-style-type: none"> 1. <i>If in-person:</i> Collect WIC ID Card. 2. Locate existing participant record. 3. Write down Household (HH) ID#. 4. Open the daily schedule and double click on the group class. 5. Click the Add button 6. Enter the HH ID # and click the Search button 7. Find the correct HH and click the check box under <i>select</i> column and click the OK button 8. Click the Save button
<p>Step 2 Mark Attended or On-Site</p> 	<p>Attended Scheduled Appt.:</p> <ol style="list-style-type: none"> 1. Go to the Daily Schedule and locate your group class appointment. 2. Double click on the group appointment slot. 3. Click the Attended button for the participants who attended. 4. Click the Save button at the bottom of the class pop up. 5. Click on the Close button to close the popup.
<p>Step 3 Household Info Screen</p>  <p><i>Head of Household (HOH)</i></p>	<p>Update individual participant information upon check in:</p> <ol style="list-style-type: none"> 1. Review HOH name and birth date to ensure correct. 2. Verify/Update address, phone, etc. as applicable. <ol style="list-style-type: none"> a. If screen is updated, add a Service Location for WIC staff and HOH. 3. Close participant record by selecting Search. 4. Ask HOH if any changes are needed to their current benefits including breastfeeding changes and next appointment preferences. Note discussions.
CPA	
<p>Step 4 Cert Action Screen *Breastfeeding dyads only</p> 	<p>Note: Complete ONLY for a breastfeeding woman and a breastfeeding infant if their breastfeeding status has changed. (CPAA staff must refer changes to CPA).</p> <p>If changes have occurred since the last visit, click on the BF Status Change button, and answer the questions as appropriate for each participant.</p>
<p>Step 5 Breastfeeding Screen *Breastfeeding dyads only</p> 	<p>Note: Complete ONLY for a breastfeeding woman and a breastfeeding infant to verify and update continued breastfeeding status.</p> <ol style="list-style-type: none"> 1. Ensure that mom and baby are linked (single gestation). 2. Add any BF Support & Notes, click Next.

<p>Step 6 *Nutrition Education </p> <p>Refer to NPS Nutrition Education for requirements on effective group education.</p>	<p>Document:</p> <ol style="list-style-type: none"> 1. Click Add to generate a Nutrition Education row. 2. Click in the Method box to select type of education, Primary Group or Secondary Group 3. The Topic should be auto-populated 4. Add a Note - Indicate “group session completed” <ol style="list-style-type: none"> a. Refer to <i>NPS Documenting in WIC MIS</i> for guidance. 5. Click Next to move to the Food Prescription Screen.
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<p>Step 7 *Food Prescription </p> <p>Refer to the Desktop reference: “Healthy Options for WIC”</p>	<p>Review participant’s current Food Package:</p> <ol style="list-style-type: none"> 1. Ask: “If anyone needs any changes to your WIC benefits, please see me after class.” 2. Modify food package if requested. (CPAA must refer changes outside core food packages or requests for Medically Prescribed Formula.) 3. Ask: “What questions or concerns do you have about shopping for WIC foods or using your EBT card?” <p>*If education is provided remotely, please call participant, and complete this screen.</p>
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Frontline or CPA Issuing Benefits

<p>Step 8 *Issue Benefits  *Schedule Appt</p>	<ol style="list-style-type: none"> 1. Issue Benefits <ol style="list-style-type: none"> a. Issue Benefits and close when “EBT transaction completed successfully” appears. b. Review <i>Family Shopping List</i> and ensure participant has current vendor list, Illinois <i>WIC Authorized Food List</i> and <i>Family Shopping list</i>. 2. Review next appointment types and Schedule next appointment, on or before the BVT date.
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